Job Aid:
How to Clone a Bid in COMMBUYS

This Job Aid shows how to:

- Clone a Bid in COMMBUYS
- Edit and create a "Sent" Bid

Of Special Note:

Bids (solicitations) are published documents that request price quotes on goods and services from potential vendors. Cloning will allow you to copy (or clone) a previously created Bid in order to create a new BID, thus eliminating the need to re-enter the majority of the data. This job aid focuses on cloning a bid created in COMMBUYS.

Keep in mind: When cloning a Bid in COMMBUYS, you may need to do the following:

- All documents required should be added to the Bid using the Attachments tab in COMMBUYS.
- Cloning migrated Comm-PASS Bids in COMMBUYS does not carry over the attachments, however Bids created or previously cloned in COMMBUYs carry over all attachments from the original Bid to the cloned Bid. Therefore you may choose not to add or upload attachments to the cloned Bid, or delete attachments that carry over. Remember to review all attachments and make changes, specifically to all time sensitive information.
- The new Bid will have new document # and allow you to edit data in any way you need to in order to update the bid information. The last page of this job aid contains a table with operational definitions for the types of Bids and COMMBUYS navigation.

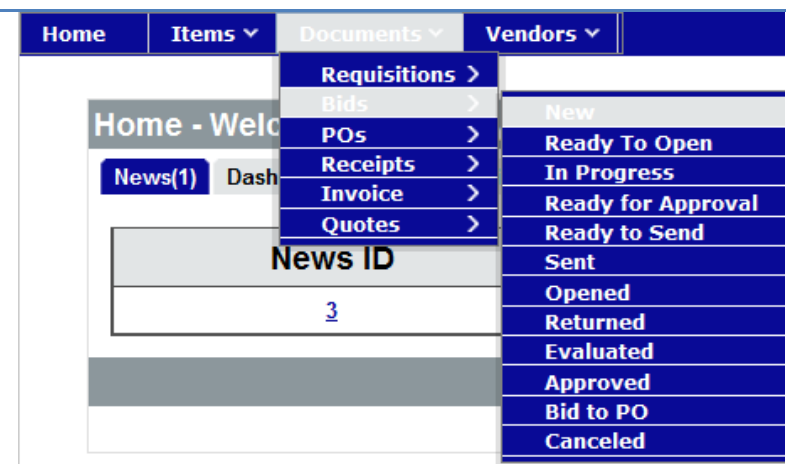| Screenshot	Directions
	1. Launch the COMMBUYS website by entering the URL https://www.commbuys.com/bso/ into the Browser Enter your Login ID and Password

Screenshot	Directions
Basic Purchasing	**Inquiry**	2. Upon successful login, select the **Basic Purchasing** role on the upper right side of the page if not selected already.
January 6, 2014 6:24:20 PM EST	Note: If you only have one user role, Basic Purchasing, no tabs display.

Home **Items** ∨ **Documents** ∨ **Vendors** ∨ Requisitions > **Home - Welc** Bids > POs > **News(1)** Dash Receipts > Invoice > **News ID** Quotes > 3	**New** **Ready To Open** **In Progress** **Ready for Approval** **Ready to Send** **Sent** **Opened** **Returned** **Evaluated** **Approved** **Bid to PO** **Canceled**	3. To clone a new bid from one originally created in COMMBUYS go to the blue Navigation Bar, and select **Documents > Bids > New**

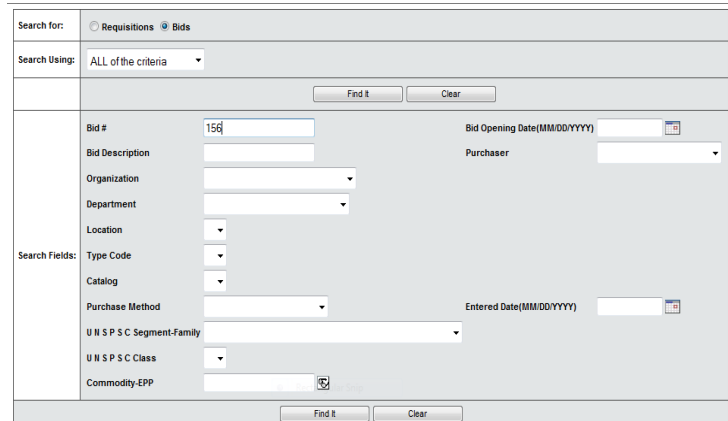|	
Create a New Bid Please select the method to create a new bid: ○ Create a bid from scratch. ◉ Clone a bid from another document. ○ Copy Contracts For Renewal. Continue Cancel & Exit	4. The Create a New Bid window opens with three options: • Create a bid from scratch • Clone a bid from another document • Copy Contracts For Renewal Click the radio button next to **Clone a bid from another document.** Click the **Continue** button.

Search for: ○ Requisitions ◉ Bids Search Using: ALL of the criteria ▼ Find It Clear Bid # 156 Bid Opening Date(MM/DD/YYYY) Bid Description Purchaser Organization Department Location Search Fields: Type Code Catalog Purchase Method Entered Date(MM/DD/YYYY) U N S P S C Segment-Family U N S P S C Class Commodity-EPP Find It Clear	5. The Search Box displays. Next to **Search for**: click the radio button for **Bids** and enter the search criteria for the bid that you wish to clone. Some Search Options include: • Bid #: COMMBUYS Bid number • Bid Description: department number schema, formerly the Comm-PASS Bid title • Purchaser • Organization • Department Click the **Find It** button.

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Screenshot	Directions
	6. The Search Results page appears with a list of Bids created in COMMBUYS. Click on the radio button next to the Bid you wish to select to clone. Click **Clone Bid & Exit**
	7. Another way to clone a Bid is to open the Bid you wish to clone. Select the **Summary** tab and scroll to the bottom of the page. Click the **Clone Bid** button

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Screenshot	Directions

Screenshot

Blanket Bid BD-15-1080-1080C-1080L-00000000263   Status: 2BI - In Progress

General | Items | Address | Accounting | Routing | Attachments(1) | Notes | Bidders | Questions | Amendments | Q & A | Reminders | Summary

General Validation Errors

• The following required fields are missing: bid opening date, available date.

Bid Number:	BD-15-1080-1080C-1080L-00000000263
Status:	2BI - In Progress
How Solicited:	Email
Department:*	1080CONVD - Default Data Conversion Department
Location:*	1080L - Default Data Conversion Location
Show on Web:	☑
Required Date:	
Available Date :*(MM/DD/YYYY HH:MM:SS AM or PM)	
Bid Type:	Open Bid
Control Code:	
Print Dest Detail:	Always
Purchase Method:*	Blanket
Blanket Begin Date:*(MM/DD/YYYY)	
Tax Rate:	
Item Single Award Only:	☐
Info Contact:	
Pre-Bid Conference: (Max size: 250 characters)	
Bulletin Desc: (Max size: 500 characters)	
Quote Notification:	☐
Transaction Size (Commonwealth Departments Only) :	
Date Last Updated:	08/28/2014 02:54:10 PM

Description:*	COMMBUYS Communications
Purchaser:*	Buyer, Buyer
Type Code:	SH - Historical Solicitation
Fiscal Year:	2015
Organization:	Operational Services Division
Allow Electronic Response:	☐
Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)	
Purge Date:(MM/DD/YYYY)	
Informal Bid:	☐
Estimated Cost:	$0.00
Alternate ID:	
Catalog Id:	
Blanket End Date:*(MM/DD/YYYY)	
Print Format: *	Bid Print Form
Solicitation Enabled:	No
User last Updated:	Buyer Buyer

Save & Continue

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Directions

8. A new Bid is created and opens to the **General** tab where important information about the bid is entered, such as: setting the bid dates and bid type.

Note: Red Validation errors display upon initial creation of the bid. These will resolve after entry of all required information.

Mandatory fields for Bid:

- **Department**: select from the department from dropdown, if not automatically populated
- **Location**: select the location dropdown; if not automatically populated
- **Available Date:** date the bid will be viewable on COMMBUYS
- **Purchase Method** (dropdown): select from the dropdown
  - Open Market – one time bid
  - Contract – do not use
  - Blanket – results in a contract (departmental or statewide)
- **Description:** is a searchable field; enter short bid description (option to use your agency's Bid numbering schema)
- **Purchaser**: defaults to designated purchaser
- **Fiscal Year**: will auto populate but can be changed
- **Bid Opening Date**: use the calendar icon to select the scheduled date to open the bid for review and award, which closes the bid to vendors. COMMBUYS will no longer accept quotes for that Bid and the Buyer is able to open and view quotes.
- **Print Format**: only one option; ignore

Mandatory fields for Blanket (contract):

- **Purchase Method:** dropdown; if Blanket is selected, two additional fields requiring input populate:
  - **Blanket Begin Date**: beginning date of the blanket, use the calendar icon to select date
  - **Blanket End Dates**: blanket end date, use the calendar icon to select date
- **Type Code:** dropdown; only use the two options below
  - SS – Statewide Solicitation (only authorized SW contracts)
  - NS – Non-Statewide Solicitation

Screenshot	Directions

	(continued from previous page)
	
	Optional fields:
	• **How Solicited:** select from dropdown
	   ○ Email (default)
	   ○ Fax
	   ○ Telephone
	   ○ Walk-In
	• **Show on Web**: controls if the bid displays and is searchable in COMMBUYS – general rule to leave checked
	• **Required Date**: use calendar icon to select the date the commodity or service is required; can also be left blank
	• **Bid Type**: select from dropdown
	   ○ Open – available for all Vendors to view and respond (default)
	   ○ Closed – only selected Vendors on the Bid can view and respond
	• **Control Code**: leave blank
	• **Print Dest Detail**: leave blank
	• **Tax Rate**: n/a for Commonwealth
	• **Item Single Award Only**: leave unchecked
	• **Purge Date**: **DO NOT use**
	• **Informal Bid (check box)**: if selected, you can view the submitted vendor quotes before bid opening date but cannot award them
	• **Alternate ID**: leave blank
	
	Click the **Save & Continue** button when finished.

Screenshot	Directions
	9. Click the **Items** tab. The Items tab opens. First delete the item(s) if they do not apply to this new clone. Click the check box next to the item or to delete all click the top Delete box and click **Save & Continue**. There are three options to add an item • Search Items • Search Inventory Items • Add Items

Screenshot	Directions

10. Click the **Add Items** button. Input the item information. Major fields on this page include:

- **Print Sequence*** – value defaults
- **Description*** – enter complete description of good or service; be as specific as possible
- **Quantity** – enter quantity (must be at least 1)
  - If bid is for a specific number enter that quantity; if unknown enter 1
- **Unit Cost** – N/A, unless known then enter a cost
- **UNSPSC** –set of codes that classify goods and services into standardized groups; use the drop down or eye glass icon to search for the most relevant code (see step 11)
  - Segment/Family
  - Class
- **Other Product Information** – these fields are optional, use them to provide additional details about the solicited goods or services.

11. To add the UNSPSC code to the item, go to the UNSPSC Segment / Family field and click the eyeglass icon. The Search page for UNSPSC Segment / Family opens.

The Search Code screen populates, use the available search dropdowns and fields to find the best code. Select the radio button on the left side of the screen to choose the best code and click the **Save & Exit** to return to the Items tab.

Add as many items as required for the Bid, by clicking **Save & Add New**. Click the **Save & Exit** button once finished with all required bid items and the **Items General** tab redisplays.

Screenshot	Directions
Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 — Status: 2BI - In Progress General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary **Ship-to Address** / **Bill-to Address** 1080 - Conversion Address / 1080 - Conversion Address One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperiscope.com One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items	12. Click the **Address** tab to continue the bid. Review the Ship-to and Bill-to Addresses. Click the Eyeglass icon to add or change either address. **Note**: Organization Administrators maintain the Ship-to and Bill-to addresses. To update or add additional addresses, contact the OA.
Lookup Ship-to Address - Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Search Using: ALL of the criteria ▼ Search Fields: Department ID ____ Department Name ____ Department Suffix ID ____ Department Suffix Name ____ Location ID ____ Location Name ____ City ____ County ____ Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Find It Clear Close Window Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	13. The Lookup Ship-to Address window displays. Input the search criteria and click **Find It**. If no criterion is entered all possible addresses for the Organization will appear by clicking **Find It**.
Select / Department ID / Department Name / Department Suffix ID / Department Suffix Name / Address Info ⦿ / 00100 / PETS PLUS / 100 / 10055 / Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617) 999-9999 Select Close Window	14. The search results display. Check the radio button in the Select column adjacent to the address you would like to select. Click the **Select** button at the bottom of the page.
Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 — Status: 2BI - In Progress General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary **Ship-to Address** / **Bill-to Address** 1080 - Conversion Address / 1080 - Conversion Address One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperiscope.com One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items	15. The search page closes and the selected address populates with the Ship-to Address. Click the **Save & Continue** button.
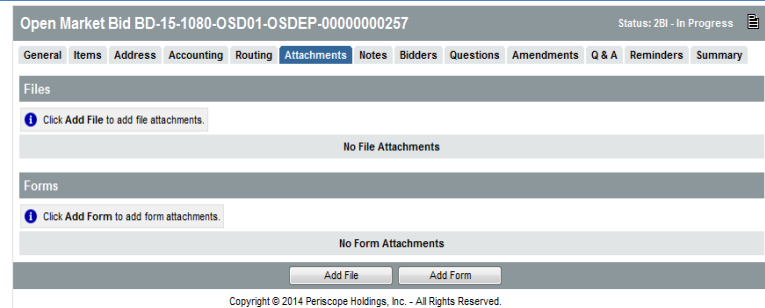
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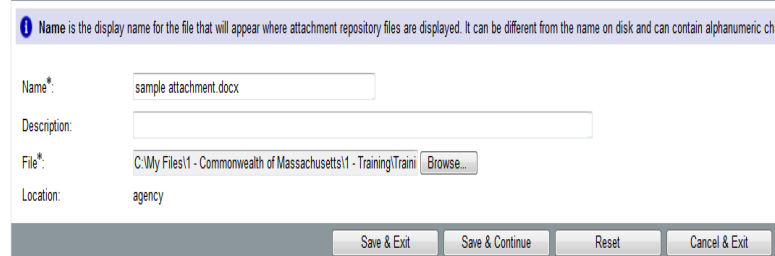| Screenshot	Directions
	16. Click the **Attachments** tab. The **Attachments** tab displays. Click the **Add File** button to add a new file. There are currently no size limitations for files, and COMMBUYS supports all file types for Buyers. **Note:** Add Form is not a currently working function in COMMBUYS
	17 The Add File window opens. Complete the following fields: • **Name** – auto populates after file selection • **Description:** optional but recommended; a short description of the file. Click the **Browse** button to select a file. To add another file, click the **Save & Continue** button. When all file uploads are complete, click the **Save & Exit** button.
	18. The Attachments tab redisplays with the new file attached.
	19. Select the **Notes** tab. Add an optional note in the Note box. Click the **Save & Continue** button. Notes are only viewable by Commonwealth users; vendors will not have access to view these notes, but they are part of the public record.
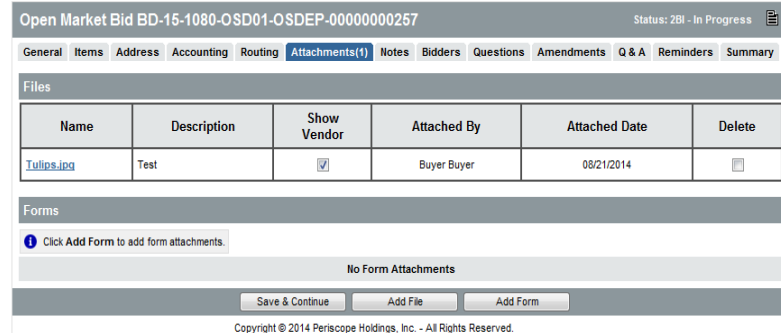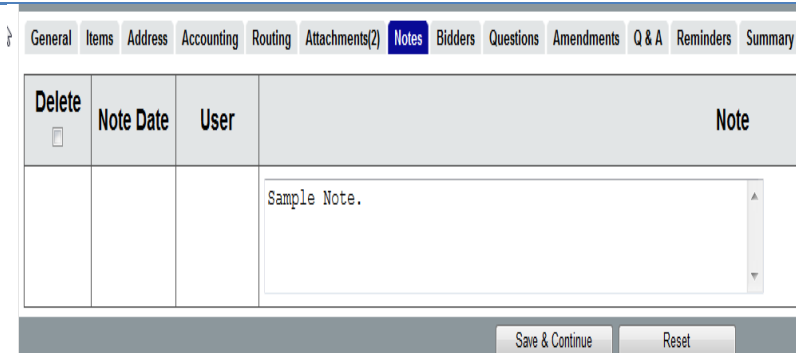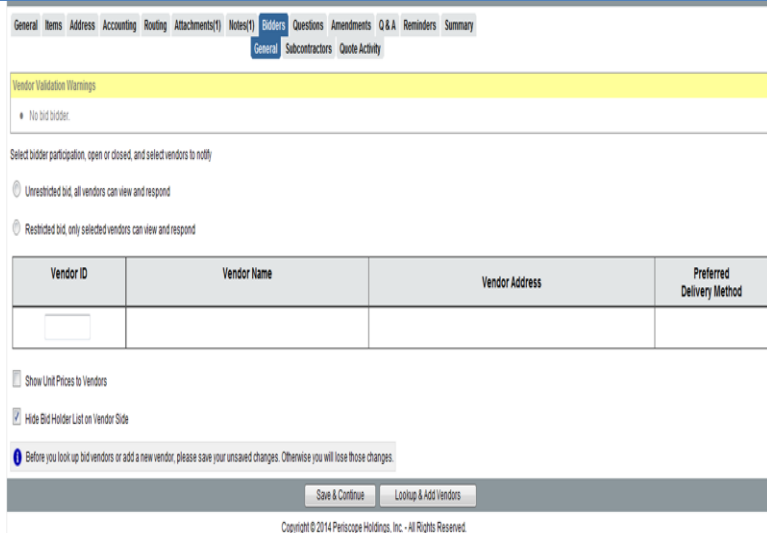
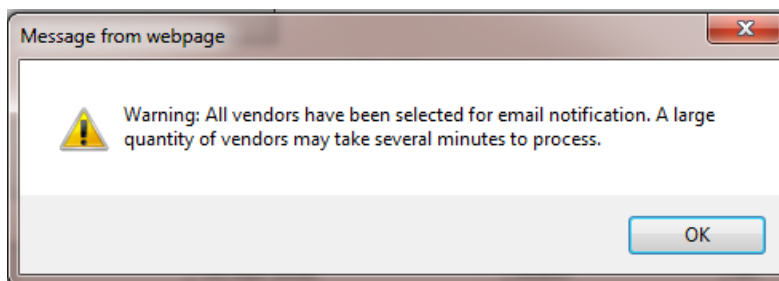| Screenshot	Directions

	20. Click the **Bidders** tab.
	
	The names of the Bidders listed on the Bidders tab will carry over from the original Bid if there are any. To add new Bidders, click **Lookup & Add Bidders** button.
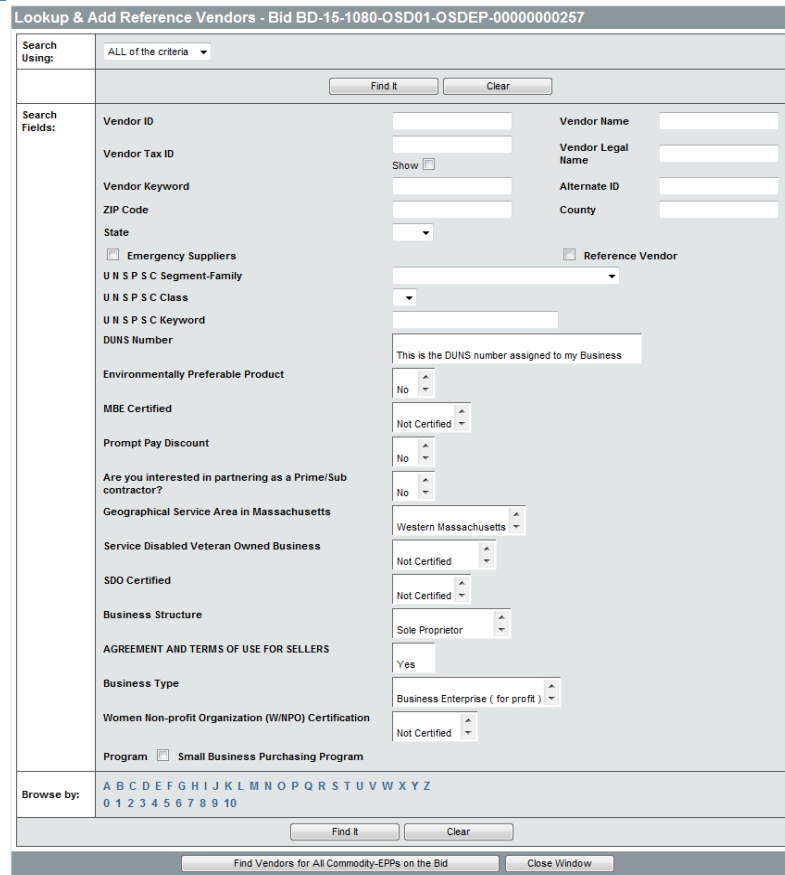	
	Several options can be set on the Bidders tab:
	• **Select bidder participation**
	  ○ **Unrestricted** – any vendor can respond to the bid
	  ○ **Restricted** – only listed vendors can respond to the bid
	• **Show the Unit Price to Vendors** – when unchecked (default) bidders cannot see the unit price for bid items
	• **Hide Bid Holder List on Vendor Side** – when checked (default), bidders cannot see who has responded to the bid

	21. Click **Lookup & Add Vendors**. The Lookup and Add Reference Vendors screen displays. Scroll to bottom of the screen and select **Find Vendors for All Commodity-EPPS on the Bid** button. The results will display with the Vendors who selected the same commodity code as the bid item(s). COMMBUYS automatically matches the vendors who have correctly registered with UNSPSC codes; these vendors will receive an email notification of the Bid.

Screenshot	Directions

22. Click the top Select checkbox to check all the Vendors.

Buyers can also add vendors by name and also use the other search parameters listed, SDO, SBPP, etc.

A popup window displays with a Warning Message when selecting a large number of vendors.

Click **OK**. The popup window will disappear and all information populates in the bid.

Click **Save & Exit** to return to the Vendors tab

23. The **Vendors tab** now displays all the selected vendors.

Buyers should see email selected as the preferred method of delivery.

Click **Lookup & Add Vendors** multiple times to ensure that vendors with different commodity codes relevant for your bid are included, by entering the criteria in the search field.

COMMBUYS will create a combined notification list of all vendors you select through multiple vendor searches. If a vendor appears gets selected multiple times, COMMBUYS will keep the company on the list once to avoid duplicate notification.

Screenshot	Directions
	24. Click the **Questions** tab (this is an optional tab) The Questions tab allows the addition of questions to the bid the vendors answer as part of the bid response. Questions can be required. Complete the question entry. Click the **Save & Continue** button.
	25. Click the **Q&A** tab. The **Q&A** tab is a way for vendors and the Commonwealth to dialog within the bid. This feature is only usable before the bid opening date; however, the questions and answers remain viewable after the bid is opened. In addition to adding the questions, there are two options on this page: • **Allow Vendor to submit questions** – make sure to check if questions are allowed for the bid • **Send notification when vendor sends question** – use if you want notifications of questions sent in COMMBUYS Click **Save & Continue** after entry of each question.
	26. Click the **Reminders** tab (this is an optional tab) To create a reminder, input the information on the Reminder tab including: • **Due Date** • **Comment** • **Remind Whom** • **Days Prior to Remind** • **Send Email** When the reminder is sent, the tab updates with the Date Completed.

Screenshot	Directions
	27. Click the **Summary** tab. The Summary tab provides a recap of the Bid information. Shown here is the upper part of the Summary tab. The Summary Tab displays all information input from previous tabs Click the **Submit for Approval** button to submit the bid into the workflow for approval routing.
	28. Shown here is the lower part of the **Summary** tab that provides a summary of each item on the bid as well as the action buttons currently available for the bid: • **Submit for Approval** • **Cancel Bid** • **Clone Bid** • **Print** After reviewing the information, click the **Submit for Approval** button to submit the bid into workflow for approval routing. Skipped Tabs: • **Accounting**: Phase II • **Routing**: populates after submission for approval

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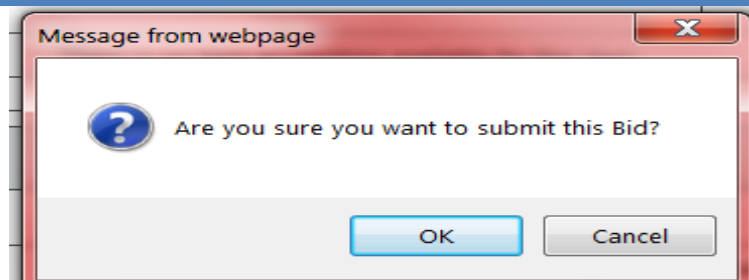
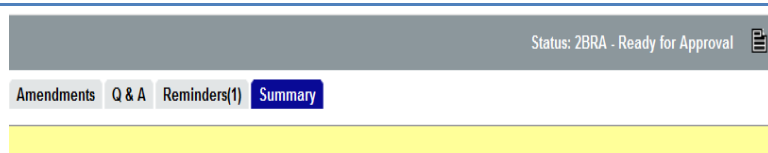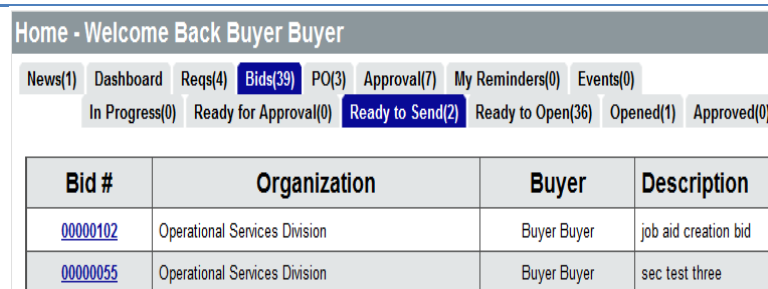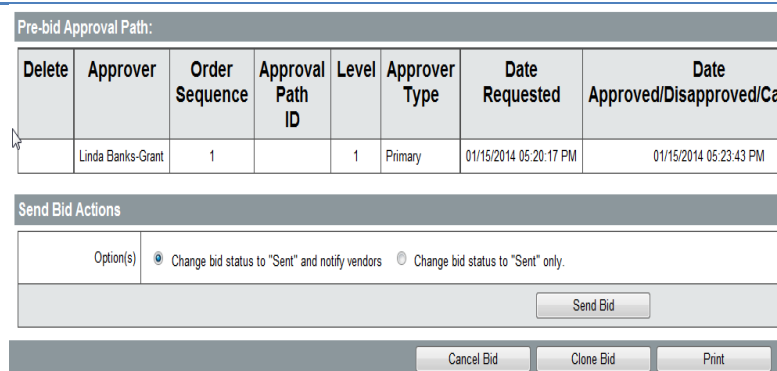| Screenshot	Directions
	29. A Popup message displays asking 'Are you sure you want to submit this Bid?' Click **OK** to continue with the submission. To cancel the submission, click **Cancel**. Click **Continue**.
Status: 2BRA - Ready for Approval Amendments Q & A Reminders(1) **Summary**	30. The Bid Summary tab redisplays showing a status of Ready for Approval.
Home - Welcome Back Buyer Buyer News(1) Dashboard Reqs(4) **Bids(39)** PO(3) Approval(7) My Reminders(0) Events(0) In Progress(0) Ready for Approval(0) **Ready to Send(2)** Ready to Open(36) Opened(1) Approved(0) Bid # 00000102 Operational Services Division, Buyer Buyer, job aid creation bid Bid # 00000055 Operational Services Division, Buyer Buyer, sec test three	31. Once the Bid is approved, the Bid's status will update in your Control Center on the Home Page as shown here. The Bid has changed from **Ready for Approval** to **Ready to Send**. Click on the Bid hyperlink to open.
Pre-bid Approval Path: Linda Banks-Grant 1 1 Primary 01/15/2014 05:20:17 PM 01/15/2014 05:23:43 PM Send Bid Actions Option(s): ● Change bid status to "Sent" and notify vendors ○ Change bid status to "Sent" only Send Bid Cancel Bid Clone Bid Print	32. The bid opens to the **Summary** tab. Scroll to the bottom of the page. Under Send Bid Actions, Select either the RADIO button option: • **Change bid status to 'Sent" and notify Vendor** – general rule to use this option • **Change bid status to "Sent' only** – posts the Bid on COMMBUYS but does not send an email notification to the selected bidders. Click on **Send Bid** button. The bid is now posted on COMMBUYS, Vendor may be able to respond depending on the available date set on the General tab